

Employee Post-Travel Disclosure of Travel Expenses

Date/Time Stamp:

RECEIVED
SECRETARY OF THE
PUBLIC RECORDS

2018 AUG -8 PM 4:56

Post-Travel Filing Instructions: Complete this form within 30 days of returning from travel. Submit all forms to the **Office of Public Records in 232 Hart Building**

In compliance with Rule 35.2(a) and (c), I make the following disclosures with respect to travel expenses that have been or will be reimbursed/paid for me. I also certify that I have attached:

- ☒ The **original** *Employee Pre-Travel Authorization* (Form RE-1), **AND**
☒ A **copy** of the *Private Sponsor Travel Certification Form* with all attachments (itinerary, invitee list, etc.)

Private Sponsor(s) (list all): American Council for Energy Efficient Economy

Travel date(s): May 23rd 2018

Name of accompanying family member (if any): _____

Relationship to Traveler: ☐ Spouse ☐ Child

IF THE COST OF LODGING DID NOT INCREASE DUE TO THE ACCOMPANYING SPOUSE OR DEPENDENT CHILD, ONLY INCLUDE LODGING COSTS IN EMPLOYEE EXPENSES. (Attach additional pages if necessary.)

Expenses for Employee:

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
<input type="checkbox"/> Good Faith Estimate <input checked="" type="checkbox"/> Actual Amount	325.01			Conference Registration \$405

Expenses for Accompanying Spouse or Dependent Child (if applicable):

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
<input type="checkbox"/> Good Faith Estimate <input type="checkbox"/> Actual Amount				

Provide a description of all meetings and events attended. See Senate Rule 35.2(c)(6). (Attach additional pages if necessary.): Spoke at the American Council for Energy Efficient Economy Conference on Property Accessed Clean Energy and Consumer Protection.

8/8/2018
(Date)

Candace Vahlsmeyer
(Printed name of traveler)

[Signature]
(Signature of traveler)

TO BE COMPLETED BY SUPERVISING MEMBER/OFFICER:

I have made a determination that the expenses set out above in connections with travel described in the *Employee Pre-Travel Authorization* form, are necessary transportation, lodging, and related expenses as defined in Rule 35.

8/9/2018
(Date)

[Signature]
(Signature of Supervising Senator/Officer)



American Council for an Energy-Efficient Economy

529 14th Street, N. W., Suite 600 ☎ Washington, D.C. 20045 📞 202.507.4000 📠 202.429.2248 🌐 www.aceee.org

Hello Candace,

ACEEE would like to officially invite you to moderate a plenary session on Residential Property Assessed Clean Energy at the 2018 Energy Efficiency Finance Forum on May 22nd in Tarrytown, NY. We are offering to waive your registration because you are going to be speaking at the conference.

The panel will be part of the morning session that takes place from 8:30am to 10:30am. There are a few speakers before you, so you will likely be speaking from 9:15 until the close of the session.

Please let me know if you have any further questions or concerns.

Thank you,

Brian Stickles

Senior Research Analyst, Economics & Finance Policy



American Council for an Energy-Efficient Economy

000000004521

8:35am: Anmol Vanamali, Financing Strategies Director, VEIC, delivers Co-Chair address. Anmol introduces Erin

8:45am: Erin Robert, Executive Director, Sustainable Finance, JPMorgan Chase & Company, delivers Keynote

9:15am: Brian Stickle thanks Erin Robert, introduces Candace Vahlsing, Senior Advisor for Energy, Climate, and

9:15 – 10:30am: Plenary session: Property Assessed Clean Energy (PACE) and Consumer Protection

Senior Research Analyst, Economics & Finance Policy



PRIVATE SPONSOR TRAVEL CERTIFICATION FORM

This form must be completed by any private entity offering to provide travel or reimbursement for travel to Senate Members, officers, or employees (Senate Rule 35, clause 2). Each sponsor of a fact-finding trip must sign the completed form. The trip sponsor(s) must provide a copy of the completed form to each invited Senate traveler, who will then forward it to the Ethics Committee with any other required materials. The trip sponsor(s) should **NOT** submit the form directly to the Ethics Committee. Please consult the accompanying instructions for more detailed definitions and other key information.

The Senate Member, officer, or employee **MUST** also provide a copy of this form, along with the appropriate travel authorization and reimbursement form, to the Office of Public Records (OPR), Room 232 of the Hart Building, within thirty (30) days after the travel is completed.

1. Sponsor(s) of the trip (please list all sponsors): The American Council for an Energy-Efficient Economy
2. Description of the trip: To moderate a presentation at the annual Energy Efficiency Finance Forum on the role of consumer protection in Property Assessed Clean Energy (PACE) financing.
3. Dates of travel: May 21, 2018-May 22,2018
4. Place of travel: DoubleTree by Hilton Hotel Tarrytown 455 South Broadway, Tarrytown, New York, 1059
5. Name and title of Senate invitees: Candace Vahlsing Senior Advisor for Energy, Climate, & Environment
6. I *certify* that the trip fits one of the following categories:
 - ☒ (A) The sponsor(s) are not registered lobbyists or agents of a foreign principal **and** do not retain or employ registered lobbyists or agents of a foreign principal **and** no lobbyist or agents of a foreign principal will accompany the Member, officer, or employee *at any point* throughout the trip.
– OR –
 - ☐ (B) The sponsor or sponsors are not registered lobbyists or agents of a foreign principal, but retain or employ one or more registered lobbyists or agents of a foreign principal and the trip meets the requirements of Senate Rule 35.2(a)(2)(A)(i) or (ii) (*see question 9*).
7. ☒ I *certify* that the trip will not be financed in any part by a registered lobbyist or agent of a foreign principal.
– AND –
 - ☒ I *certify* that the sponsor or sponsors will not accept funds or in-kind contributions earmarked directly or indirectly for the purpose of financing this specific trip from a registered lobbyist or agent of a foreign principal or from a private entity that retains or employs one or more registered lobbyists or agents of a foreign principal.
8. I *certify* that:
 - ☒ The trip will not in any part be planned, organized, requested, or arranged by a registered lobbyist or agent of a foreign principal except for *de minimis* lobbyist involvement.
– AND –
 - ☒ The traveler will not be accompanied on the trip by a registered lobbyist or agent of a foreign principal except as provided for by Committee regulations relating to lobbyist accompaniment (*see question 9*).

000000004523

9. **USE ONLY IF YOU CHECKED QUESTION 6(B)**

I *certify* that if the sponsor or sponsors retain or employ one or more registered lobbyists or agents of a foreign principal, one of the following scenarios applies:

☐ (A) The trip is for attendance or participation in a one-day event (exclusive of travel time and **one** overnight stay) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment* of the trip.

– OR –

☐ (B) The trip is for attendance or participation in a one-day event (exclusive of travel time and **two** overnight stays) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment* of the trip (*see questions 6 and 10*).

– OR –

☐ (C) The trip is being sponsored only by an organization or organizations designated under § 501(c)(3) of the Internal Revenue Code of 1986 and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *at any point* throughout the trip.

10. **USE ONLY IF YOU CHECKED QUESTION 9(B)**

If the trip includes two overnight stays, please explain why the second night is practically required for Senate invitees to participate in the travel:

11. ☐ An itinerary for the trip is attached to this form. I *certify* that the attached itinerary is a detailed (hour-by-hour), complete, and final itinerary for the trip.

12. Briefly describe the role of each sponsor in organizing and conducting the trip:

ACEEE is a non-profit research institution that seeks to advance energy efficiency. We put together a conference called the Energy Efficiency Finance Forum, which seeks to share best practices for energy efficiency finance among its attendees.

13. Briefly describe the stated mission of each sponsor and how the purpose of the trip relates to that mission:

ACEEE's mission is to advance energy efficiency policies, programs, technologies, investments, and behaviors. This trip will include a presentation on best practices in investments, part of ACEEE's mission statement.

14. Briefly describe each sponsor's prior history of sponsoring congressional trips:

ACEEE has no history of sponsoring congressional trips.

15. Briefly describe the educational activities performed by each sponsor (other than sponsoring congressional trips):

ACEEE is a non-profit research organization that writes white papers and research reports. It also hosts conferences to share best practices in the field of energy efficiency.

16. Total Expenses for Each Participant:

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses
<input checked="" type="checkbox"/> Good Faith estimate	\$360	\$180	\$75	
<input type="checkbox"/> Actual Amounts				

17. State whether a) the trip involves an event that is arranged or organized *without regard* to congressional participation **or** b) the trip involves an event that is arranged or organized *specifically with regard* to congressional participation:

This trip involves an event that is arranged or organized without regard to congressional participation

18. Reason for selecting the location of the event or trip

Candace Vahlsing was invited by ACEEE to speak at the conference in Tarrytown, NY.

19. Name and location of hotel or other lodging facility:

DoubleTree by Hilton Hotel Tarrytown

455 South Broadway, Tarrytown, New York, 10591, USA

20. Reason(s) for selecting hotel or other lodging facility:

This is the location where the conference is taking place and ACEEE has a block of rooms available per their agreement with the hotel.

00000000004525

21. Describe how the daily expenses for lodging, meals, and other expenses provided to trip participants compares to the maximum per diem rates for official Federal Government travel:

The lodging and meals for this trip are \$255 total for 2 days or \$127.50 per day, lower than either of the maximums listed above.

Travel will be coach.

23. ☒ I represent that the travel expenses that will be paid for or reimbursed to Senate invitees do not include expenditures for recreational activities, alcohol, or entertainment (other than entertainment provided to all attendees as an integral part of the event, as permissible under Senate Rule 35).

There will be no entertainment reimbursed.

25. I hereby *certify* that the information contained herein is true, complete and correct. (For trips involving more than one sponsor, you *must* include a completed signature page for each additional sponsor):

Name and Title: Neal Elliott, Senior Director for Research

Name of Organization: The American Council for an Energy-Efficient Economy

Address: 529 14th St NW, Washington DC 20045

Telephone Number: (202) 507-4000

Fax Number: (202) 429-2248

E-mail Address: rne Elliott@aceee.org

PRIVATE SPONSOR TRAVEL CERTIFICATION FORM
SIGNATURE PAGE FOR ADDITIONAL SPONSOR
(to be completed by each additional sponsor)

I hereby *certify* that the information contained on pages 1-4 of the certification form and any accompanying addenda, all submitted in connection with the _____ trip
to _____ is true, complete, and correct.
Dates of Travel (Month, Day, Year)
Place of Travel

Signature of Travel Sponsor: _____

Name and Title: _____

Name of Organization: _____

Address: _____

Telephone Number: _____

Fax Number: _____

E-mail Address: _____

000000004527



American Council for an Energy-Efficient Economy

2018 Energy Efficiency Finance Forum

Tarrytown, New York • Doubletree by Hilton Hotel • May 21–22, 2018

PROGRAM

Monday, May 21

7:30 am–5:00 pm

REGISTRATION OPEN

8:30 am–noon

Energy Efficiency Finance 101 Workshop *(Separate registration required.)*

Sponsored by: Cadmus

The workshop provides an introduction to the world of energy efficiency finance. Instructors will help participants understand the key components that make up an energy efficiency financing program, review many of the most popular financing models, discuss the state of the market, and provide insight on what drives program performance, including best practices for program design.

On-bill Workshop *(Separate registration required.)*

Sponsored by: Harcourt Brown & Carey

This workshop provides an introduction to the concept and practice of on-bill finance and repayment. If you think all on-bill means the same thing, think again. There are many varieties of on-bill and presenters will walk you through the different varieties available. The workshop will help participants determine if on-bill, in any variety, is a useful path to pursue. Presenters will pull from real-life examples throughout the discussion.

12:00 – 1:00 pm

NETWORKING LUNCH FOR
MORNING WORKSHOP PARTICIPANTS

1:00–3:30 pm

WELCOME, KEYNOTE AND PLENARY SESSION

Introductions: **Steven Nadel**, American Council for an Energy-Efficient Economy

Co-chair welcome: **Alfred Griffin**, President, New York Green Bank

Keynote Address: **Richard Kauffman**, Chairman of Energy and Finance for New York, Office of Governor, Andrew M. Cuomo

Plenary Panel: Derisking Decarbonization: Making Green Energy Investments Blue Chip

Moderator: **Dan Reicher**, Executive Director of the Steyer-Taylor Center for Energy Policy and Finance, Stanford University

Panelists: **Leigh-Golding DeSantis**, COO and Co-Founder of SparkFund
Susan Leeds, Co-CEO, NYCEEC

82540000004528

3:30–4:00 pm

NETWORKING BREAK

4:00–5:30 pm

BREAKOUT SESSIONS

1A: RetrofitNY: Financing Models for Net Zero Energy Retrofits of Multifamily Affordable Housing

This panel will include a summary of RetrofitNY, a new initiative aimed at catalyzing a net zero energy retrofit market at scale. Achieving scale for this market will require, among other things, the ability to underwrite all (or at least a major portion) of the projected operational savings from these renovations. Several leading multifamily lenders will discuss various financial mechanisms that could help achieve these aggressive underwriting standards.

Moderator: **Greg Hale**, New York State Energy Research and Development Authority, NYSERDA

Presenters: **Sadie McKeown**, Community Preservation Corporation
Susan Leeds, New York City Energy Efficiency Corporation
Chrissa Pagitsas, Fannie Mae

1B: On-Bill Market Update

Moderator: **Philip Henderson**, Natural Resources Defense Council

On-Bill Financing: Expanding the Reach of Energy Efficiency Programs

Presenter: **Vincent Wynne**, Pepco Holdings

NegaWatts-as-a-Service: Nationwide On-Bill Financing for Residential Efficiency

Presenter: **Katie Theiss**, Arcadia Power

On-Bill Financing: Assessing Its Feasibility for Your Utility

Presenter: **Mathieu Poirier**, Dunsky Energy Consulting

1C: Energy Efficiency Financing in Commercial Buildings

Moderator: **Matthew Brown**, Harcourt Brown & Carey

Integrating Building Energy Efficiency into Commercial Real Estate Transactions

Presenter: **Paul Mathew**, Lawrence Berkeley National Laboratory

Navigating Recent Trends in Commercial Energy Efficiency Financing

Presenter: **Joe Indvik**, RE Tech Advisors

What Does It Take to Make a Commercial Financing Program Work?

Presenter: **Mary Templeton**, Michigan Saves

6:00–7:30 pm

NETWORKING RECEPTION

Tuesday, May 22

7:30 am–4:30 pm REGISTRATION OPEN

7:30–8:30 am CONTINENTAL BREAKFAST

8:30–10:30 am WELCOME, KEYNOTE AND PLENARY SESSION

Introductions: **Brian Stickles**, American Council for an Energy-Efficient Economy

Co-chair welcome: **Anmol Vanamali**, Vermont Energy Investment Corporation

Keynote Address

Matthew Arnold, Managing Director and Global Head of Sustainable Finance at JPMorgan Chase

Plenary Panel: Property Assessed Clean Energy (PACE) and Consumer Protection

Moderator: **Candace Vahlsing**, Senior Advisor for Energy, Climate, and Environment for
U.S. Senator Michael Bennet, State of Colorado

Panelists: **Cisco DeVries**, Chief Executive Officer, Renew Financial
Jon Rao, Attorney, National Consumer Law Center

10:30–11:00 am NETWORKING BREAK

11:00 am–12:30 pm BREAKOUT SESSIONS

2A: Serving Rural Communities

Moderator: **Mary Shoemaker**, American Council for an Energy-Efficient Economy

Advancing a Clean Energy Economy in Central Appalachia

Presenter: **Hannah Vargason**, Natural Capital Investment Fund

On-Bill in Rural Communities

Presenter: **John-Michael Cross**, Environmental and Energy Study Institute

Manufactured Housing: A Nexus of Clean Energy and Affordable Housing Finance

Presenters: **Mark Wyman**, Energy Trust of Oregon

Desiree Sideroff, Craft3

2B: Green Bank Evolution

Moderator: **Jeff Schub**, Coalition for Green Capital

From Failed to Troubled and Beyond

Presenter: **Gwen Yamamoto Lau**, Hawaii Green Infrastructure Authority

Green Banks: Working at All Levels

Presenter: **Tom Deyo**, Montgomery County Green Bank

Colorado's Portfolio Approach to Clean Energy Financing

Presenter: **Paul Scharfenberger**, Colorado Energy Office

2C: Multifamily Lending — Panel Discussion

Moderator: **Amy Brusiloff**, Bank of America

Panelists: **Sadie McKeown**, Community Preservation Corporation
Katie Elmore, Community Investment Corporation
Esther Toporovsky, Enterprise Community Partners
Chrissa Pagitsas, Fannie Mae

12:30–1:30 pm **NETWORKING LUNCH**

1:30–3:00 pm **BREAKOUT SESSIONS**

3A: Evolution of Residential Loan Programs and Their Effectiveness

Moderator: **Andrew Nih**, Southern California Gas Company

Exploring Financing Influence and Cost-Effectiveness Relative to Rebates

Presenters: **Alan Elliott**, Opinion Dynamics
Alex Hill, Dunskey Energy Consulting

Building Markets by Reducing Risk, Fostering Collaboration, and Listening to the Customer

Presenter: **Kerry O'Neill**, Connecticut Green Bank

Trends in Single Family Energy Efficiency Loan Programs

Presenter: **Miriam Joffe-Block**, California Alternative Energy and Advanced Transportation Financing Authority (CAEATFA)

3B: PACE Market Update

Moderator: **Greg Saunders**, CleanFund Commercial PACE Capital, Inc.

A New ERA of PACE Financing

Presenter: **Colin Bishopp**, Renew Financial

Lessons in Commercial PACE Leadership: The Path from Legislation to Launch

Presenter: **Sean Williamson**, US Department of Energy

R-PACE and Consumers: Mortgage Payment Impacts and Consumer Protection Developments

Presenter: **Jeff Deason**, Lawrence Berkeley National Laboratory

The Progression of PACE in New York

Presenter: **Susan Morth**, Energize NY

2018 Energy Efficiency Finance Forum

3C: Innovative Multifamily Financing

Moderator: **Trenton Allen**, Sustainable Capital Advisors

Leaving Nothing on the Table: Lessons from Integrating Energy Efficiency and Solar Resources in Affordable Multifamily Buildings

Presenter: **Dan W. York**, American Council for an Energy-Efficient Economy

Is the Unicorn Real? ESCO Services for Affordable Housing

Presenters: **Jeffrey Greenberger**, Affordable Community Energy Services Company
Adler Prioly, Reinvestment Fund

Discussion of Case Studies from a Full-Service ESCO that Uses a Blended Finance Approach to Meet the Needs of Building Owners with a Public Purpose

Presenter: **Brian Pine**, Commons Energy

3:00–3:30 pm **NETWORKING BREAK**

3:30–5:00 pm **BREAKOUT SESSIONS**

4A: Efficiency as a Service

Moderator: **Miriam Wrobel**, Miriam Wrobel Consulting

Energy Efficiency as a Service

Presenters: **Bob Hinkle**, Metrus Energy
Paul Bienstock, Citi

Residential Energy Savings Agreements (ESAs) in Practice

Presenter: **Andy Frank**, Sealed

4B: Small Business Financing

Moderator: **Robert Lurie**, New York Power Authority

Challenges to Financing Energy Efficiency Projects among Small Businesses

Presenter: **Bruce Torkelson**, Lime Energy

Small Business Market Insights on Financing Energy Efficiency

Presenters: **Jake Millette**, Opinion Dynamics
Leslie Malone, Dunsy Energy Consulting

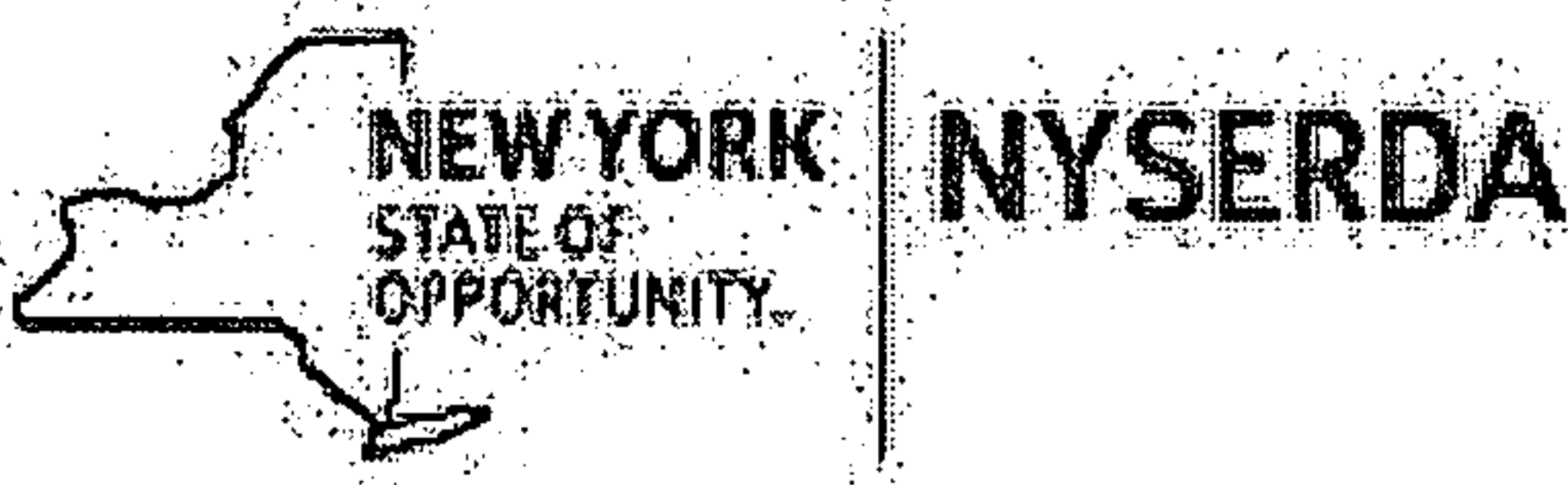
4C: Data Standardization: How to Inspire Confidence with Machine Learning, Finance, Insurance, and Real Time Metering

Moderator: **David Tine**, HSB/MunichRe

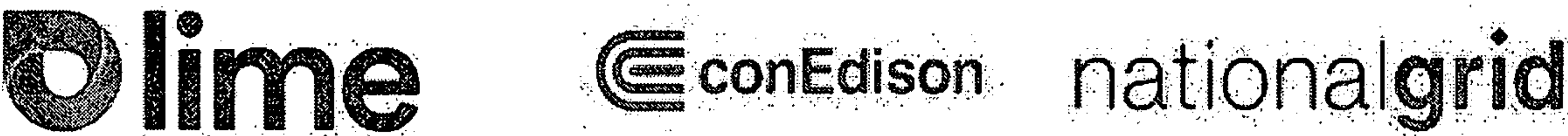
Presenters: **Megan Fisher**, NYSERDA
Lauren Salz, Sealed
Panama Batholomy, Investor Confidence Project
Michael Burke, CLEAResult

ACEEE would like to recognize the following sponsors and Ally program contributors for their generous support of the 2018 Energy Efficiency Finance Forum.

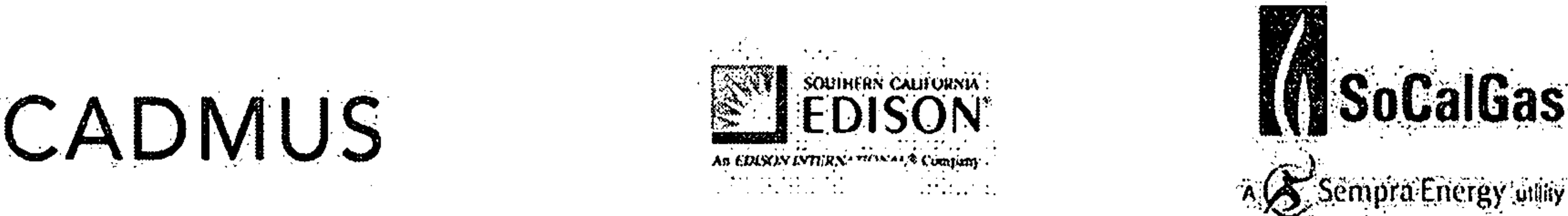
HOST



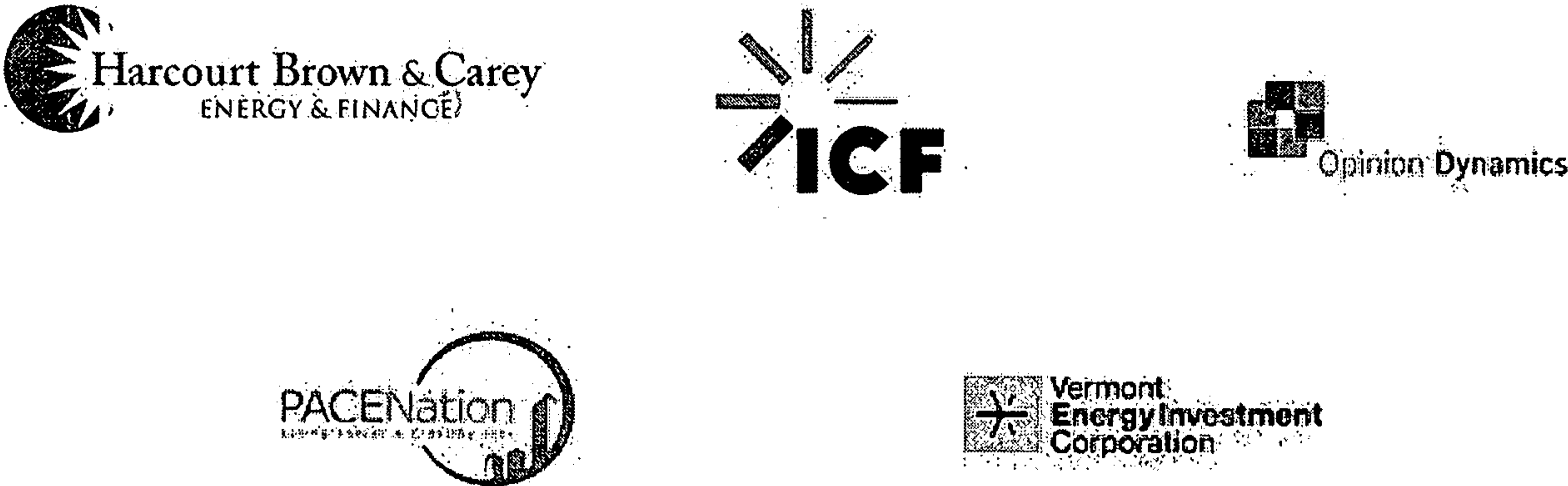
GOLD



SILVER



BRONZE



2018 Energy Efficiency Finance Forum